



Foreign Agricultural Service

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Slovakia

Retail Food Sector

Multinationals Are Storming the Market

2000

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Report Highlights: The last two years have seen a revolution in Slovakia's retail food sector. Foreign owned firms are entering the market at a dizzying pace and changing the previously staid retail sector. Annual retail sales in Slovak crowns (SKK) increased by 15% last year but this growth has been hidden (in dollar terms) by currency appreciation. Foreign retailers are forecast to have 15% of total market share by 2003.

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SECTION I. MARKET SUMMARY

The 1998 elections in Slovakia gave foreign wholesale and retail investors greater confidence. Recently there has been an all out 'invasion' by foreign firms seeking to become established in this market. The boom came later to Slovakia than in neighboring countries such as the Czech Republic, Hungary and Poland, which already have entrenched foreign partners and significantly expanded retail networks. Prior to 1998, Slovak retailers faced very little competition and abused this market position by charging excessive margins and providing relatively poor customer service. The small size of the Slovak market (only 5.5 million consumers) and a sluggish economy also held back retail sector growth and foreign investment.

Table 1 - Annual Retail Sales and Imports of Agricultural and Food Products

(in Mil. USD)	1997	1998	1999	2000
Total annual retail sales	\$10,276	\$9,82	\$10,048	\$10,222
Annual retail sales of food products	\$2,168	\$2,112	\$2,243	\$2,222
Imports of agricultural & food products	\$755	\$763	\$664	\$689
Exchange rates (SKK/USD)	38	41	44	45

SECTION II. ROAD MAP FOR MARKET ENTRY

U.S. products are not well recognized in Slovakia due to a lack of consumer knowledge about U.S. brands and a lack of in-country brand promotion. However, because of the recent expansion of large multinational retail chains, U.S. suppliers may now take advantage of narrower distribution channels and can easily include Slovakia as part of a regional marketing effort. This is made even easier by the fact that several of the large grocery chains have located their distribution and marketing activities in the Czech Republic (e.g. Tesco, Carrefour and Delvita). Consumption patterns for consumer food products are also similar to the Czech Republic (see FAS GAIN Report [EZ0009](#) on the Czech retail sector).

Working with a Foreign Retailer

Suppliers usually have to register their products with the company headquarters. Individual stores are then able to contact suppliers and purchase products directly from the supplier. To facilitate ordering, administration, and logistics, often only two or three competing brands are marketed for some products and it can be difficult to introduce new brands onto an already crowded shelf. For a list of Slovak buyers see Section VI.

Large international retail chains have also managed to shift many of the costs associated with retailing onto suppliers. Common business practices now include: (i) listing and slotting fees (ranging between 30,000 to 100,000 SKK (\$600 - \$1,000) for a product with an average shelf placement); (ii) extended payment periods (up to 90 days); and (iii) financial contributions for marketing promotions.

Hypermarkets, Supermarkets, Warehouses, & Malls

The introduction of hypermarkets changed shopping behavior in Slovakia almost overnight. Low prices, long store hours (often 24 hours a day), large parking lots, promotional sales, and a diverse product selection have attracted Slovak consumers who until recently were used to walking to small local stores. Today, a hypermarket may serve regular customers in an radius of 20-30 km. However, many new sites are under construction and store density will increase dramatically in the next five to ten years. One result will be a decline in retail food prices in line with what has occurred in Hungary and the Czech Republic. Another consequence will be a further decline in sales for small, local retailers.

In 1998 only five international retail companies appeared among top 50 largest retail companies in Slovakia. This figure will surely change in the coming years and, according to government estimates, the market share of foreign-owned hypermarkets will increase to 15% by 2003. Tesco alone plans to open up four new hypermarkets in Slovakia in 2001. Industry sources also report that, per meter of hypermarket space, Slovakia has the highest volume of sales of any country in the region. This indicates that the market is still under served.

Currently, there are two shopping malls under construction in Bratislava. Since Slovakia has just about 8 - 10 cities with population over 50,000, it is not expected that the growth in large shopping malls will mirror the boom in hypermarkets.

Table 2 - Size of Retailers (million USD)

Name of Retailer	Ownership	Annual turnover in 1998	from which in food	Annual turnover in 1999	from which in food	Number of retail outlets in 1999
Tesco Stores	British	\$107	\$44	\$134	\$50	8
Prima Zdroj Holding	Slovak	\$88	\$73	\$86	\$70	60
Billa	German	\$22	\$17	\$66	\$57	18
Opal-Fytos Group	Slovak	\$50	\$50	\$59	\$59	17
Smoker	Slovak	\$56	\$56	\$57	\$57	8
Euroholding Verex	Slovak	\$41	\$29	\$48	\$36	20
M-Market	Slovak	\$37	\$33	\$41	\$34	104
Labas	Slovak	\$31	\$28	\$41	\$36	1
Kon-Rad	Slovak	\$39	\$34	\$40	\$34	4
Essex	Slovak	\$39	\$31	\$39	\$30	32
Jednota, SD Nove Zamky	Slovak	\$32	\$24	\$33	\$25	100
Delvita	Belgium	\$0	\$0	\$21	\$19	14
Interkontakt Group	Czech	\$96	\$71		NA	NA

Convenience Stores, Gas Marts, Kiosks

The number of convenience stores, gas marts and kiosks have grown tremendously in the last 10 years - from a handful in 1990 to almost 3,000 in 2000. The number of gas stations has increased more than five-fold in the last ten years and almost all of the new stations are coupled with convenience stores that provide a significant share of the station's operating revenue. Although

prices are higher in convenience stores, convenience sales account for about 10% of overall retail sales (see table 4). It is generally agreed that the carrying capacity for convenience stores has been reached and that future expansion will be modest.

Specialized Stores

The most common specialized stores in Slovakia are meat/butcher shops, bakeries, and poultry stores. Customers are usually served over the counter by a clerk. The stores are operated mainly by processing companies that have invested in retail outlets (a common practice in Slovakia since small retailers are often slow to pay and own-brand stores give processors reliable access to (paying) retail consumers). Almost every food processor has at least one own-brand store to sell their products and these are often located next to or within the processing plant. Many of these stores are now broadening their product range and it remains to be seen what future role they will play in the face of competition from hypermarkets. Specialized stores are also under considerable pressure from multinational hypermarkets which usually have their own bakeries, butchers, and fish sections.

Table 3 - Number of Retail Outlets

	1999	2000	2003
Convenience stores, Gas marts, Kiosks	2800	2840	3000
Cash & Carry	87	90	110
Hypermarkets	2	5	15
Supermarkets	231	300	500
Grocery stores	10800	10400	8000
Club warehouses	0	1	5
Total	13920	13636	11630

Small Grocery Stores and Traditional Markets

The small grocery stores found throughout the country are most threatened by the growth of hypermarkets. While they currently account for over half of all retail food sales, this will surely decline, especially in urban areas. About 10% of the population regularly shops for food in traditional/wet markets. Locally grown fruits, vegetables, and small livestock are the most common products purchased. A 1995 law requiring the use of electronic cashiers for all sales led to many of the occasional suppliers of 'farmers markets' to drop out and further decline in this sector is expected.

Franchising

Franchising in Slovakia is just beginning to grow and includes hotels, fast food operations, petrol stations, and business services. Franchising agreements are treated as commercial contracts and regulated by the commercial code. American franchisees in Slovakia are limited but do include McDonald's and Pizza Hut. Some of the McDonald's restaurants are company-owned, others are franchises. Now may be a good time to get into the market, but franchisers should be prepared to offer creative financial programs. Some of Slovakia's best entrepreneurs do not have the access to capital to pay traditional franchising fees.

Table 4 - Retail Outlet Market Share

	1999	2000(p)	2001(f)	2002(f)	2003(f)
Hypermarkets	0.3%	4.4%	8.0%	11.0%	15.0%
Grocery stores	56.3%	52.0%	46.0%	40.0%	35.0%
Supermarkets	20.0%	22.0%	25.0%	29.0%	31.0%
Convenience stores/Kiosks/Gas marts	10.0%	10.5%	11.0%	11.0%	11.0%
Club Warehouses	0.0%	0.1%	0.5%	1.0%	1.5%
Traditional Markets	13.4%	11.0%	9.5%	8.0%	6.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

(f) forecast

(p) preliminary

SECTION III. COMPETITION

Until recently, Slovak wholesalers and retailers faced only modest competition in large part because of the lack of foreign capital and management in the food retail sector. This enabled them to charge higher prices and provide lower levels of customer service than retailers in neighboring countries. Competition strengthened almost overnight in areas where supermarkets and hypermarkets have opened outlets. In the future, competition will not only be between local retailers but also between foreign retail chains.

Most of the competition on imported products comes from the countries of the European Union (EU) and some dairy products, dried fruits, produce, spirits, etc. have lower tariffs from the EU than from other countries.

An estimated 80%-90% of food products sold by multinational hypermarkets are produced in Slovakia. The main advantage of domestically produced products is price and in some cases exceptionally good quality (e.g. beer). The advantages of imported products are often simply a lack of domestic production (e.g. seafood, some produce) and a growing consumer demand for more product choice.

U.S. products have limited or no international competition in the following categories: peanut butter, Tex-Mex foods, cranberry sauce and juice, bourbon, and microwave popcorn. There is also little U.S. vs. U.S. product competition in the market.

SECTION IV. BEST PRODUCT PROSPECTS

Products with growth potential in Slovakia are:

- dried fruits and nuts, mainly prunes, almonds, and peanuts;
- whisky and bourbon are becoming popular, especially when supported by in-store promotion activities;
- snack food as chips, biscuits, and crackers
- pet food
- Tex-Mex, salsa, corn chips, etc.
- fish and seafood consumption is expected to rise quite significantly
- higher quality citrus fruits
- rice (long grain, shipped mostly through German wholesalers)
- cranberry juice and frozen juice concentrates
- poultry meat (a 300 MT WTO tariff rate quota is not currently being filled)

Table 5 - Advantages and Challenges

Advantages	Challenges
High quality of U.S. products	Low purchasing power
New retail chains provide a reliable and familiar environment in which to promote products.	Sales may be price rather than quality driven Strong U.S. dollar.
Less expensive distribution through large retail chains within Slovak market	Lack of knowledge about U.S. brands by importers, retailers, and consumers
U.S. products are considered as safe and regarded as being of generally high quality	A recent 'law on conformity assessment' creates some regulatory uncertainty.
Headquarters of some international chains in Czech Republic	Trade barriers, especially for domestically produced products (beef)

SECTION V. LEGISLATION AND TRADE BARRIERS

Tariff and Non-tariff Barriers

Import duties (as well as the import surcharge, excise duty and value added tax) are collected by customs offices after submission of a customs declaration. Payment is due within 10 days of notification by customs authorities.

Detailed information on Slovakia's WTO duty binding may be found at:

http://www.fas.usda.gov/scripts/wtopdf/wtopdf_frm.idc

Actual applied tariff rates for goods imported into Slovakia may also be obtained by calling USDA/FAS at 202-720-1341 (fax: 202 690-2079). This information may only be available by HS code only.

Import Surcharges

On June 1, 1999, a 7% import surcharge was introduced and applied to all food products. The import surcharge was decreased to 5% effective January 1, 2000, 3% effective July 1, 2000 and will go to zero on December 31, 2000.

Value Added Tax (VAT) and Excise Taxes

There are two VAT rates: 23% and 10% and Most food products are subject to lower rate. Excise duties are imposed on alcoholic beverages and tobacco products. The import VAT is based on the total of the customs value of the goods + customs duty + import surcharge + excise duty (if applicable). There have been periodic proposals to lower the basic VAT to 22% and to raise the lower VAT rate to 12%.

Import and Export Licences

The licensing system is Slovakia's primary non-tariff measure. The Ministry of Economy is authorized to issue import and export permits or licenses for sensitive goods with the objective of protecting the domestic market. Licensing procedures are governed by Regulation no. 15/1998 and 163/1999. These regulations also include individual lists of products subject to the licensing procedures.

Certification and Standards

The Slovak Office of Standards, Metrology and Testing (OSMT) (www.normoff.gov.sk) is responsible for technical standards and product testing.

Products are regulated by the Technical Requirements for Products and Conformity Assessment Act, which closely follows EU legislation. According to the law, importers or producers are responsible for assessing the conformity of their product to technical requirements.

The Act sets up 11 categories of goods following the EU classification system. Almost all products fall into the first three categories (A, B and C). Producers or importers can declare that their products fall within category A without pre-market testing. Other categories may require pre-market testing. The Directive on Technical Products temporarily moves a number of products, such as electrical equipment, chemicals, cosmetics, textiles, toys, machines and food products from module A into modules B and C. This could potentially complicate testing requirements for testing of imported goods and exporters should research this topic as part of their market entry strategy. Information on Slovak-based consulting firms knowledgeable about customs valuation, testing and standards may be found in Section VI.

The Slovak Government will gradually harmonize Slovak technical norms and legislation with EU legislation. As harmonization is implemented for a given product area, the affected products will be automatically moved into module A. The majority of the harmonization legislation should be approved by the end of year 2000.

Labeling Requirements

Slovakia introduced its own system of labelling in 1995, replacing the old Czechoslovak system. Under a 1995 State Language Law, companies are required to mark contents of domestically produced or imported goods, product manuals, product guarantees, and other consumer-related

information in Slovak.

The Political Debate Over Foreign Hypermarkets

Large international retail chains are using several standard business practices to drive down supplier prices, including slotting fees, extended payment periods, and charges for product promotion. These practices are viewed by some local producers as unfair and the government is under some pressure to pass laws that favor suppliers. In particular, Slovak processors are trying to introduce two major points into draft legislation:

- (1) 30% of market share should be guaranteed to Slovak origin products (this would violate provisions on national treatment in the WTO);
- (2) to set payment period for all food products equal to the 14 days currently required for bulk agricultural products.

The development of legislation affecting foreign-owned hypermarkets is being closely watched by EU.

Table 6 - Anticipated Expansion of International Chains in Slovakia (2000 - 2005)

Chain	Type of outlet	Ownership	Location	Expansion aims
Tesco	Super/ Hypermarkets	British	Supermarkets - down towns, Hypermarkets - urban areas	Tesco ranked first for three years in a row (1997-9) opened first Hypermarket in Slovakia in June 1999 in Nitra - 12,000m ² . Since then another three have been opened in Kosice, Bratislava and Banska Bystrica. Annual sale in 2000 is expected to reach \$115 Mil. Future plans: to construct 5-6 hypermarkets within next two years and to reconstruct Tesco Supermarkets. Tesco imports many U.S. products through Wakefern, a New Jersey-based wholesaler.
Billa	Supermarkets	German		According to REWE representative in Koln Billa should operate 100 food supermarkets before end of 2005.
Kaufland	Hypermarkets	German	Less urban areas	German Kaufland plans to open 4 discount hypermarkets in Nitra, Presov, Kosice and Poprad.
Metro	Hypermarkets	German	Urban areas	Metro plans to open three hypermarkets in Slovakia within next two years.
Obi	Super/ Hypermarkets	German		Obi officially declared an interest to open in the next 4 years 15 super/hypermarkets (first 4 should start operation in 2001)
Jednota	Grocery Stores/ Supermarkets	Slovak	Rural areas	37 Slovak Consumer Co-operatives Jednota had annual turnover in 1999 \$536 Mil. They operate 2075 retail stores, 19 supermarkets. Retail market share in 1999 was 16,7%. Slovak alliance Coop Centrum Slovakia was established in 1998 to purchase goods for all Jednota, integration is planned also in wholesale and marketing. Future to create just 5-6 strong specialized chains. Attempts to create Multinational Cooperative with Hungary and Czech Republic.
Zdroj	Stores/ Supermarkets	Slovak	Across the country	Zdroj establishes alliances to become more powerful to compete with foreign retail chains
Delvita	Supermarkets	Belgium	Large Cities	Delvita opened its first supermarket at the end of 1998. In first half of 1999 opened another 11 supermarkets in leased space. 90% of the goods are food items. Delvita plans to open new distribution center. About 50% of their products are Slovak origin products. Goal: to have 24 outlets in 2002-3
Carrefour	Hypermarkets	French	Shopping Malls in Bratislava	75% of Slovak Origin products, less then 20% food products. The strategy is to approach local food producers.
Rema 1000	Discount Franchise		mainly Building estates in Bratislava	Turnover in 2002 is expected to reach \$35 Mil.. Plans to build 100 more stores in the next 4 years.

The Cooperatives Jednota and Zdroj were the major state-owned food distribution, wholesale and retail companies prior to 1990. As part of a national privatization process, they were broken up into hundreds of small retailers, wholesalers and distribution companies. Faced with the threat posed by hypermarkets, these loosely organized firms have started to cooperate on purchasing and marketing. Beginning in 1998, Coop Slovakia was established as a purchasing and marketing organization for 37 retailers. With outlets throughout Slovakia, Coop Slovakia plans to strengthen its position in rural areas as well as to maintain their market share in urban areas. Coop Jednota has also begun discussions with other retailers in the region in the hope of forming a larger, multinational, marketing and distribution firm.

SECTION VI. CONTACT AND FURTHER INFORMATION

Government Organizations

Central Control and Testing Institute (certification of plants, seeds, pet food)

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Director: Pavel Filkorn

State Veterinary Administration (certification of livestock, fish and seafood)

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Slovak Agriculture and Food Inspection (certification of food products)

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(Supplier of gas stations and convenience markets.)

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(Wholesaler, distributor, and importer of dried fruits and nuts, canned fruit, rice, and citrus concentrates.)

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Director: Ing.A.Kubik

(Wholesaler and distributor, importer and exporter of fresh fruit)

Lagris Slovakia s.r.o.

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Tel.+421-95-6323502

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Contact Person: E.Marton

(Wholesaler, distributor, and importer of rice, pulses, dried fruits and nuts.)

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(Importer of raw materials for production of soft drinks, juices and syrups.)

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(Importer, wholesaler, and distributor of whisky, bourbon, liquors, spirits and other beverages)

Retail Trade Organizations

Union of Wholesale and Retail In Slovakia (Zvaz obchodu SR) – Avodis

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Dagmar Hatarova

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